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FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
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FR-1-47

February 10, 1947

WORLD RICE CROP SLIGHTLY BELOW AVERAGE ^{1/}

The 1946-47 world rice crop estimated at 7,100,000,000 bushels, though 11 percent above last season's short crop of 6,400,000,000 bushels, is still 4 percent below the prewar (1935-36 to 1939-40) harvest of 7,400,000,000 bushels. The largest production gain is in the Far East where 95 percent of the world's rice normally is produced.

Substantial increases in China, India, and Japan should improve food conditions in these countries, which are the world's largest producers as well as normally the heaviest importers. In Burma production also increased substantially, but output in all surplus producing countries continued much below prewar. Exportable supplies in 1947, therefore, are expected to exceed only slightly the low level of last year.

Output in Europe is recovering, but it is not yet back to prewar. In the Western Hemisphere, a record production was harvested in North America, but early forecasts of the South American harvest are below the bumper crops of last season.

Asia: So far this season, weather has been favorable for production in most countries of the Far East. China's crop of 2,320,000,000 bushels is estimated to exceed last year's by 200,000,000 bushels, chiefly because of increased production in central China (see page 88). In India, a good crop on near-record acreages, should yield about 15 percent, or 300,000,000 bushels more than the production of 1,960,000,000 bushels of last year. The 1946-47 crop is about 18 percent above prewar (1937-38 to 1941-42), and should exceed to some extent India's prewar rice utilization, as compiled from official Indian statistics.

In Japan, the 1946 crop exceeds the extremely small output of the previous year by 22 percent, or 100,000,000 bushels. The 1946 harvest, however, was only 94 percent of prewar. Imports of 5 billion pounds in terms of brown rice would be required in order to maintain prewar utilization. Requirements for rice in that country have increased because of an increase in population.

Production in the Philippine Islands is up substantially above last year's crop, but is still about 10 percent less than prewar. The 1946-47 crop decreased that country's rice deficit from more than 1 billion pounds to around 450 million pounds in 1947, on the basis of prewar utilization. Faced with the problem of grossly inadequate import supplies in 1946, British Malaya succeeded to some extent in increasing its production. Since its crop normally supplied about one-third of its prewar consumption, however, this country will continue to need considerable rice imports.

^{1/} The Northern Hemisphere harvests in 1946 are combined with the 1947 production of the Southern Hemisphere countries.

ENOUGH RICE: World acreage, yield per acre, and production, averages 1930-31 to 1939-40, annual 1944-45 to 1946-47 a/

South America:													
Argentina	25	52	128	122	-	59.8	-	1,054	3,112	6,807	7,736	-	-
Brazil	2,074	2,329	-	-	-	28.5	-	58,970	66,449	d/ 102,880	d/ 115,130	-	-
British Guiana	78	70	93	-	-	50.8	-	3,445	3,559	4,812	-	-	-
Chile	-	26	110	119	83	81.1	-	18	1,299	7,862	5,778	-	-
Colombia	-	-	-	-	-	-	-	2,508	3,378	5,923	d/ 6,030	-	-
Ecuador	-	-	-	-	-	-	-	2,212	3,439	4,850	7,630	-	-
Peru	126	107	-	-	-	42.8	-	4,551	4,578	6,406	7,500	-	-
Surinam	29	37	31	35	-	46.0	-	1,078	1,703	1,685	1,724	-	-
Uruguay	33	13	16	-	-	66.6	-	284	866	1,030	1,423	-	2,547
Total	2,580	2,990	4,730	4,920	4,870	-	-	75,000	89,200	144,400	160,200	-	156,000
Africa:													
Egypt	352	463	643	654	656	71.6	69.2	20,876	33,155	39,908	42,454	-	45,417
French West Africa	1,065	1,562	-	-	-	13.4	-	18,087	20,936	-	-	-	-
Madagascar	1,354	1,195	1,334	1,433	1,430	28.3	24.0	34,166	33,823	31,354	37,722	-	34,290
Sierra Leone	307	-	-	-	-	29.4	-	9,015	-	-	-	-	-
Total	3,410	3,900	4,600	4,800	4,800	-	-	88,000	104,400	118,000	128,000	-	128,000
Oceania:													
Australia	21	23	25	28	30	92.0	-	1,620	2,117	1,560	2,524	-	-
Total	30	40	60	60	60	-	-	2,200	2,700	3,700	4,700	-	4,800
Total world	198,000	205,700	207,400	198,500	205,100	-	-	7,083,000	7,443,000	6,942,000	6,377,000	-	7,147,000

Compiled from official sources, except as noted. Figures shown in parentheses are estimations of the Office of Foreign Agricultural Relations.

a/ Crops harvested in Northern Hemisphere countries during the latter part of the year, together with those harvested in Asia principally from November to May, are combined with crops harvested in Southern Hemisphere countries during the first part of the following year. b/ Preliminary. c/ Less than 5-year average. d/ Unofficial. e/ Includes acreage and production in areas regularly reported only comprising about 92 percent of the total rice area of India. f/ Java and Madura only.

Information about Ceylon's rice crop is lacking, but if weather was favorable, production should greatly exceed last year's crop, which was reduced by drought. Substantial rice imports will also continue to be required.

Of the prewar "big three" exporting countries which together exported about 12 billion pounds annually, Burma is the only nation which is showing a return to normal. Through Government encouragement, its 1946-47 acreage increased 1 million acres, and good weather favored high yields. Although the crop is estimated to be above last year's wartime low by 100,000,000 - bushels, or 75 percent, it is not yet three-fourths of prewar. An exportable surplus of 2 billion pounds is estimated to be available for export during 1947.

Although planted acreage in Siam was increased over the small area of the preceding year, drought conditions ruined a large part of the crop at the outset of the season. The area harvested consequently was materially reduced, and the yields per acre were below average. Production is expected to be about the same as last year's crop, which was 55 percent of prewar. Some surplus is reported to be available from this harvest for exportation during 1947. Political conditions in French Indochina make it difficult to estimate that country's current rice production. Indications are, however, that its production is about the same as last year, when it was about 70 percent of prewar. Rice available for export of around 15 percent of prewar is reported from that country.

In the former surplus areas of Korea and Taiwan (Formosa), all of the 1946-47 production is being consumed locally. Korea's production was reduced by fertilizer shortages and flood conditions, and output in the American Zone is reported at 88 percent of the 1940-44 average. Because of a below-average rice crop, a shortage in other grains, and increased population, south Korea will need its entire rice crop for domestic consumption. Taiwan's output, about 35 percent larger than in 1945-46, is ample for domestic needs.

Europe: Production in Europe did not rise in proportion to its increased planted acreage. In the producing countries, the shortage of commercial fertilizers continued to retard progress toward prewar harvests. Total production is estimated at 41 million bushels, compared with 34 million in 1945, and it is still 25 percent less than prewar.

The largest gain occurred in Italy, achieved solely by a 28-percent gain in acreage, since the yield per acre was reported smaller than in 1945. In Spain, acreage was increased 5 percent, but the reduced yield per acre in this country caused a decline in total production. The acreage in Portugal rose by 16 percent and production was substantially larger than last year's crop, a virtual failure.

Africa: The output in the exporting countries of Africa approximates that of last year, or 20 percent above prewar. Egypt's planted acreage remained at its high wartime average, and good weather favored harvesting a near-record crop. Early in the marketing season it was estimated that in

exportable surplus of 440 million pounds would be available, but it would move only if that country were able to obtain adequate imports of other grains in 1947. In Madagascar, the crop was smaller and the exportable surplus, in recent years about 10 million pounds annually, was reported to be less than average.

North America: In North America, a record rice crop was harvested from the largest acreage in history. Production in the United States was 5 percent more than the preceding year's large harvest, and was 43 percent above the prewar average. During the planting season, Mexico's acreage was believed to be larger than in 1945, and weather has been reported favorable.

A slight increase over that of the previous year took place in the production of the Caribbean countries due mainly to a good crop in Cuba. Output in the Dominican Republic was not so large as the preceding year's record crop. Since in this area, imports normally equal approximately 90 percent of the rice consumed, the slight increases in production will have little bearing on import requirements.

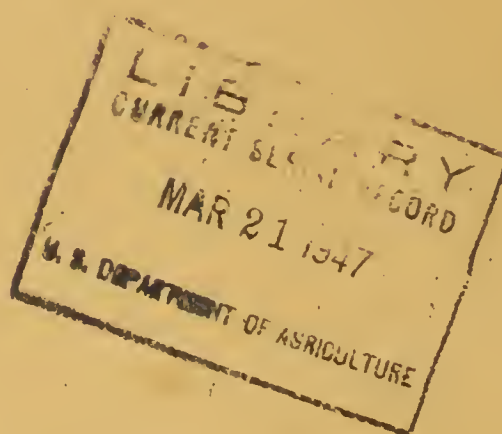
Central America: Preliminary estimates indicate that the total production in Central America was slightly below that in 1945-46. Drought at the beginning of the growing season reduced the crop in Nicaragua to about 50 percent of normal. Supplies available for export from that country to other Central American countries in 1947, therefore, should be insignificant.

South America: The size of the South American rice crop will depend on the outcome of Brazil's harvest, which is principally from March to May. Current reports indicate that a large production may be harvested in that country. The acreage in Rio Grande do Sul, Brazil's principal rice-exporting State, is estimated at 494,000 acres, a 10 percent decline from the 551,000 planted a year earlier. Weather in January, however, was reported to be excellent, and a very good crop may be harvested in that State.

In Ecuador, the anticipated increase in acreage in 1947 was prevented by late rains during the planting season, and the production, harvested from May to August, probably will be smaller than last season's crop. The official estimate placed Chilean acreage at 30 percent less than that of 1945-46. In contrast with the poor yields harvested that year, high yields are expected from the current harvest. Production may be as large as last season's and exportable supplies may continue at about the same reduced level.

A bumper crop in British Guiana was 43 percent larger than the prewar average. Exportable supplies from that country to the Caribbean should be as large, if not larger, than in any previous year. Surinam's harvest was almost twice that of the preceding year, and a surplus of about 20 million pounds is reported available for export.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Fred J. Rossiter, L. Thelma Willahan, A. B. Lewis, William E. Cummings, and Kathryn H. Wylie.





FOREIGN AGRICULTURE CIRCULAR

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UNITED STATES DEPARTMENT OF AGRICULTURE
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BRAZIL'S RICE OUTPUT SHARPLY ABOVE PREWAR

The 1947 rice crop of Brazil, the largest producer in the Western Hemisphere, is forecast at about the same as last year's record, or nearly double the prewar output. Favorable weather conditions are reported in the important producing States on an acreage nearly as large as last year's. Revised estimates received in the Office of Foreign Agricultural Relations place the 1946 crop at 136 million bushels of rough rice, compared with 66 million during the prewar (1936-40) period and with the United States record production of 70 million bushels in 1946.

Exportable supplies during 1947 from Brazil's crop now being harvested are estimated between 250 and 350 million pounds. Because of the continued shortage of wheat flour, the percentage of total production exported is not expected to be as large as the increased production of the past 2 years might indicate. Rice exports during 1946 totaled about 400 million pounds, according to preliminary figures. Although this was a record volume exported, and 60 million pounds more than the previous largest exports in 1944, it was less than was generally anticipated from the big 1946 harvest.

BRAZIL: Rice (milled) exports by country average 1936-40, annual 1942-46

Country of destination	: Average : : 1936-40 : : Million : : pounds :	: : : 1942 : : Million : : pounds :	: : : 1943 : : Million : : pounds :	: : : 1944 : : Million : : pounds :	: : : 1945 a/ : : Million : : pounds :	: : : 1946 a/ : : Million : : pounds :
Argentina.....	40	b/	0	13	0	0
United Kingdom.....	2	100	121	237	165	353
Germany.....	8	0	0	0	0	0
Sweden.....	1	32	14	10	b/	0
Switzerland.....	2	12	18	14	0	0
France.....	9	0	0	0	0	0
Un. of So. Africa ..	b/	12	19	43	18	15
Other countries	21	26	14	13	12	25
Total.....	83	182	186	330	195	393

Compiled from official statistics.

a/ Preliminary. b/ Less than 500,000 pounds.

Substantial quantities of the total exports were shipped from the State of Sao Paulo for the first time in 1946. In contrast with former years, when Rio Grande do Sul exported around 90 percent of the total, 58 percent was shipped from Rio Grande do Sul, and 40 percent from Sao Paulo. Virtually all of the increased production in other States, in recent years representing about one-half of total output, was consumed domestically. Brazil's 1946 exports from all States equaled about 10 percent of domestic production, as compared with nearly 40 per-

cent exported from the United States 1946 crop.

Brazil's utilization of milled rice in 1946, estimated at 3,600 million pounds, was nearly 25 percent larger than the preceding year. Consumption has increased every year since 1940, but the sharp gain in 1946 was the largest in any year. The increase was 700 million pounds above the utilization of 1945, and 1,700 million larger than before the war (1936-40). This rise was due primarily to a deficiency in imported supplies of wheat and flour, which were about 1,100 million pounds less than normal. Rice was a food commodity that was not in short supply in that country at some time of the year.

BRAZIL: Rice production, trade and utilization
average 1926-40, annual 1941-46

Year	Acreage	Yield per acre	Production		Net Exports	Apparent Utilization
			Rough	Milled		
	1,000 acres	Bushels	Bushels	Million Pounds	Million Pounds	Million Pounds
Average:						
1926-30	--	--	44,889	1,247	28	1,219
1931-35	2,074	28.4	58,970	1,725	110	1,615
1936-40	2,323	28.6	66,424	1,943	83	1,860
Annual:						
1941	2,473	33.4	82,672	2,418	28	2,390
1942	2,616	35.2	92,163	2,696	182	2,514
1943	2,927	31.9	93,475	2,734	186	2,548
1944	3,527	29.3	103,394	3,024	330	2,694
1945 a/	3,702	28.4	105,182	3,077	195	2,882
1946 a/	4,154	32.7	135,799	3,972	393	3,579

Compiled from official sources.

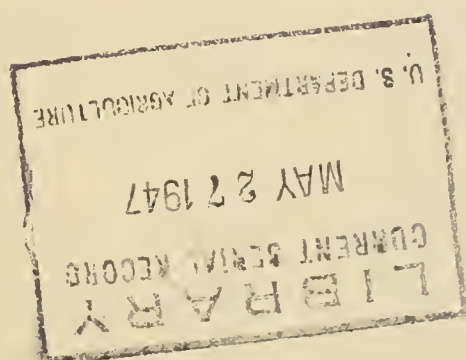
a/ Preliminary.

Rice stocks as of January 1, 1947, were estimated at 230 million pounds, approximately 150 million larger than those a year earlier. Exports from Rio Grande do Sul from January through March 1947 were about 90 million pounds, and an additional 75 million more from the old crop were scheduled for export. Unshipped purchases in central Brazil on January 1 were around 30 million pounds, of which two-thirds was shipped in January. Whether export licenses would be granted for the export of the remainder was not determined.

Prices of rice in the past year were at a level relative to prices specified in the rice purchase agreement, which was strictly adhered to through the cooperation of the Brazilian Government. Wholesale prices since

the beginning of 1947 have remained fairly constant, probably owing to continued enforcement of export controls. Prices of representative grades in April 1947 at the Sao Paulo Grain Exchange were: "Agulha" (long-grain), \$5.76 to \$7.61 per 100 pounds; and "Yellow" (short-grain), \$6.37 to \$8.48 per 100 pounds.

The rice purchase agreement between Brazil, the United Kingdom, and the United States, originally signed in December 1943, guaranteed the sale of surpluses from the crops beginning with 1943-44 to the United Kingdom at specified prices. About 20 million pounds was allowed for export to other American countries. The renewal of this agreement, which expired April 30, is still under consideration. The industry will likely receive the benefit of higher prices offered from other importing countries or in a renewed contract. Prices which prevail in 1947 may affect the quantity of rice exported. During 1946, under the agreement, 94 percent, or 370 million pounds, was sold to the United Kingdom, and shipped to countries in Asia, as Ceylon, India, and British Malaya, and to the Union of South Africa.





FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
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WORLD RICE PRODUCTION INCREASES

The world rice harvest of 1946-47 (August-July) is now estimated at 7,000 million bushels, 11 percent larger than the wartime low of 6,300 million in the preceding year, but 5 percent less than the prewar (1935-36/1939-40) average of 7,400 million bushels. Production increased on all continents, with the possible exception of South America. Information received in the Office of Foreign Agricultural Relations, regarding the acreages now being planted for the 1947-48 season, points to continued recovery from the decreased volume of rice produced during the war.

If weather conditions are favorable, larger crops should be harvested during the 1947-48 season in Asia and Europe, where the war caused serious declines in production. The 1947 acreage of China, now being planted, is expected to exceed last year's. In India, jute may replace some rice acreage in Bengal, first among the rice-producing Provinces, but in other areas, high wartime acreages will probably be maintained. Philippine production may approximate the prewar output. Of Asia's prewar exporting countries, Burma and Siam are expected to have increased acreages next year, but in French Indochina, acreage planted and harvested will depend to a great extent on political developments.

Asia: The largest gain in 1946-47 rice production was in Asia. The harvest is estimated at 6,500 million bushels (205 billion pounds milled), 650 million bushels (21 billion pounds) more than in a year earlier, but only 92 percent of the prewar average. Excluding India's output, which increased after 1941, Asia's crop is estimated to be as low as 83 percent of prewar production.

Weather was favorable for rice production in most countries. India's acreages were increased from 12 to 15 percent above the average (1935-36/1939-40), and yields were good, particularly in Bengal and Madras Provinces, which grow about 60 percent of the total crop. In China and Japan, with 2,320 and 560 million bushels, respectively, yields were above average, but smaller acreages planted to rice than formerly prevented harvesting crops as large as in the prewar period. Next to Japan, the largest recovery toward normal production was in the Philippine Islands, where the crop is now estimated at 92 percent of prewar. Korea's rice harvest was below normal on account of flood damage and lack of fertilizers.

In the prewar surplus area of Burma, Siam, and French Indochina, total production appears to be about 60 percent of normal. The combined crops are estimated at around 500 million bushels (16 billion pounds milled), compared with prewar output of 880 million bushels (28 billion pounds), a difference about equal to former exports. In Burma, where the greatest drop in production of the exporting countries occurred during the war, recovery was most rapid and showed an increase of 60 million bushels (1.9 billion pounds), or 44 percent more than

ROUGH RICE: World acreage, yield per acre, and production, averages 1930-31 to 1939-40, annual 1944-45 to 1946-47 a/

Continent and country	Acreage			Yield per acre			Production		
	Average			Average			Average		
	1930-31 to 1939-40	1944-45	1945-46	1946-47	1935-36 to 1939-40	1946-47	1935-36 to 1939-40	1944-45	1945-46
	acres	acres	acres	b/	bushels	bushels	bushels	bushels	bushels
North America									
Costa Rica	23	25	34	-	38.3	-	839	635	967
El Salvador	25	58	-	-	27.7	-	693	934	799
Guatemala	18	25	-	-	30.1	-	541	673	544
Honduras	19	-	-	-	22.0	-	401	800	1,156
Mexico	95	170	166	-	42.2	41.2	4,007	5,801	6,125
Republic of Panama	50	87	101	-	32.0	24.8	1,600	2,543	2,585
United States	883	1,004	1,494	1,584	49.7	45.2	49,852	68,830	68,150
Caribbean:									
Cuba	45	80	75	72	21.4	28.2	965	1,778	1,733
Dominican Republic	80	115	134	136	36.3	25.5	2,905	3,020	4,328
Trinidad	10	19	22	22	30.0	38.4	300	702	711
Total	1,190	2,170	2,220	2,330	-	-	51,100	86,500	88,900
Europe:									
Bulgaria	18	18	22	14	54.8	35.7	791	881	698
Italy	360	314	245	289	103.9	90.0	34,139	24,275	20,000
Portugal	39	61	55	69	68.0	50.7	1,740	3,116	2,179
Spain	117	118	119	125	96.4	76.4	14,558	12,250	10,290
Total (excluding U.S.S.R.)	540	540	480	540	-	-	51,500	41,600	34,200
U.S.S.R. (Europe and Asia)	328	-	-	335	43.4	-	10,785	-	-
Asia:									
Iran	560	-	-	-	37.1	-	22,413	18,842	19,302
Iraq	316	-	-	-	27.3	-	7,750	13,700	12,200
Turkey	66	38	45	36	61.2	57.5	3,329	4,774	2,387
British Malaya	740	-	790	810	36.3	28.1	25,333	27,099	18,650
Burma	12,770	12,671	6,983	7,760	27.5	25.5	358,219	348,534	134,155
China	47,099	48,161	-	45,905	52.5	50.6	2,345,574	2,623,383	2,100,000
Taiwan (Formosa)	1,609	1,616	-	1,297	53.0	42.5	75,340	68,339	40,671
French Indochina	13,505	14,020	-	-	22.5	-	281,497	316,038	220,000
India d/	70,288	72,707	79,885	-	26.2	-	1,995,645	2,106,426	4,961,877
Japan	7,887	7,862	7,092	-	75.8	-	557,217	595,845	457,007
Manchuria	4,112	3,838	940	400	40.6	37.5	14,923	31,783	39,094
Korea	9,140	9,716	-	-	51.0	-	197,500	195,763	175,000
Netherlands Indies e/	4,643	4,918	7,770	8,640	31.6	28.9	276,935	306,390	215,000
Philippine Islands	7,141	7,088	4,346	4,900	22.2	20.5	103,939	109,385	87,466
Siam	190,670	196,460	186,500	191,000	30.1	-	231,402	213,079	120,000
Total (excluding U.S.S.R.)	190,670	196,460	186,500	191,000	-	-	6,801,100	6,476,000	5,896,000
Total	1,190	2,170	2,220	2,330	-	-	51,100	86,500	88,900

in the preceding year. Siam's crop is believed to be about the same as in 1945-46, or 55 percent of prewar, and the harvest of French Indochina is indicated to be less than a year ago.

The largest decline in production from prewar is in the Netherlands Indies, where the 1947 crop of 250 million bushels is about 50 million larger than in 1946, but only 81 percent of the prewar average. In British Malaya and Ceylon, production increases in 1946-47 were small in relation to total import needs.

Europe: Production of 40 million bushels in 1946 was larger than in the preceding year by 8 million bushels, or 18 percent, but only 75 percent as large as prewar. Most of the gain was in Italy, where a larger acreage was planted, and weather was generally favorable. Increased acreages in Spain were more than offset by dry weather and scarcity of fertilizers, the yield per acre was very low in comparison with other years, and the crop was the smallest in several seasons. Portugal also increased its acreage, and high yields were harvested as the result of favorable weather.

Africa: Egypt maintained its wartime increase in rice acreage, and favorable weather resulted in better yields than anticipated, so that a crop nearly equal to the previous record was produced. Madagascar's output was reported at 91 percent of the preceding year, and slightly above the 1935-39 average.

South America: A large part of the crop is now being harvested. Production, estimated at 175 million bushels, is nearly equal to the record harvest of the preceding year, which was more than twice the prewar output. In Brazil, producer of three-fourths of the Continent's rice, the crop is reported to be about the same as last year's very large harvest (See Foreign Crops and Markets, May 19, 1947, p. 345). The 1946 crop of 136 million bushels was 30 million bushels, the equivalent of 880 million pounds of milled rice, or about 30 percent larger, than the previous record the year before.

Ecuador's crop may not be as large as last year's bumper harvest, despite a slight increase in acreage. In Chile, acreage dropped 33 percent below the record of a year earlier, and dry weather caused yields per acre to be less than average. The area planted in Uruguay was 57 percent larger than 2 years ago, as the result of expansion in rice growing, and favorable weather conditions benefited the crop.

British Guiana's rice production, having increased steadily since 1942, was 6 percent larger than in the preceding year, and 50 percent above the prewar average. Projects for development of the country's rice industry will probably effect the continued advancement of production.

Good weather and favorable growing conditions in Colombia made possible high harvested yields per acre. A large part of the crop was produced in February and March.

North America: A record rice crop was harvested from the largest acreage in history. Production in the United States of 70 million bushels was 5 percent more than the preceding year's large harvest, and was 73 percent above the prewar average. Mexico also produced a record crop, substantially larger than the previous record in 1945, and 75 percent larger than in the 1935-39 period.

Production in the Caribbean area is estimated at 7,300,000 bushels, (215 million pounds) compared with 7,700,000 (225 million pounds) in 1945-46. A good crop was harvested in Cuba, but revised figures for the Dominican Republic show a decrease below last year's production, primarily because of dry weather.

In Central America, the output was also slightly below last year's. The principal reduction was in Nicaragua, where drought conditions reduced the crop about one-half. The harvest in El Salvador was larger, however, and a slight increase occurred in the production of Panama.

Oceania: The harvesting of Australia's rice crop began in April. The acreage planted was the largest in 3 years, and good weather during the first part of 1947 favored the production of above-average yields.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Fred J. Rossiter, Russell S. Kifer, Thelma Willahan, O. K. Moore, Karl J. Pelzer, and Lois Bacon.



FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
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CUBAN RICE IMPORTS AGAIN AT PREWAR LEVEL

Restoration of Cuban rice imports to prewar levels for the first time in 3 years has alleviated temporarily at least an acute supply situation. Stocks, although less than prewar, are in better position than at any time since 1945. Requirements are still in excess of supply, although prices have declined somewhat. Furthermore, current stocks plus imports must maintain consumption until new-crop supplies are available in August. The expiration of the subsidy on June 30, which permits United States rice to sell at ceiling prices established in June 1942, and local requests for removal of price restrictions and distribution controls, may result in an early statement by the Cuban Government on rice distribution and price policy.

Nearly 200 million pounds imported during March, April, and May brought total receipts to 394 million pounds during the August-May period of the current marketing year, a quantity slightly above arrivals during the same period from the 1941 crop, the last year before import supplies declined as a result of the war. Rice arrivals began to increase in March of this year, following record low imports during the early part of the season. Ninety-three percent of receipts were from the United States during the current marketing year, 4 percent from Ecuador, and most of the remainder from Central American and Caribbean sources.

Imports in May of 44 million pounds were less than during March and April, when receipts were 75 and 77 million pounds, respectively. March and April imports were the largest monthly arrivals in several years. Of total imports during the 3 months, nearly all, or 99 percent were from the United States. In addition, 32 million pounds was imported during the first 2 weeks of June, all from the United States.

CUBA: Rice arrivals, August-May,
1946-47 with comparisons

Country	Average		August-July		August-May	
	1932-36	1937-41	1944-45	1945-46	1945-46	1946-47
	Million	Million	Million	Million	Million	Million
	pounds	pounds	pounds	pounds	pounds	pounds
United States.....	19	232	339	330	308	367
Ecuador.....	0	1	70	56	33	16
Chile.....	0	0	9	13	10	1
Colombia.....	0	0	0	12	8	2
Siam.....	166	135	0	0	0	0
British India, Burma...	159	24	0	0	0	0
French Indochina.....	10	42	0	0	0	0
Other countries.....	25	1	0	11	9	8
Total.....	379	435	418	422	368	394

Compiled from preliminary figures of ships' manifests, except for calendar years 1932-41, for which data are official.

Rice stocks now show an improvement over those of 1942, when lack of shipping first reduced imports and made it necessary to utilize reserve supplies. Current stocks are substantially less than prewar, however, as they are only recovering from the low point of virtually no stocks on hand 3 months ago. Stocks on June 1 were estimated at around 115 million pounds, compared with a normal inventory of from 150 to 200 million before the war.

Current stocks and imports of rice already purchased for import this summer, except for possible imports from other countries, must supply the Cuban market until imports are received from the new crop of United States rice beginning in August. Offers were reported of Brazilian rice, one of Agulha and Blue Rose at \$9.45 per 100 pounds, c.i.f. Habana. Reported offers of Ecuadoran rice were \$12.00 per 100 pounds for around 7 million pounds, the amount allocated for 1947.

Total rice consumption during 1946 and early 1947 was at the lowest level in nearly 15 years. Monthly consumption during 1946 averaged less than 35 million pounds compared with a normal of from 40 to 45 million. Potential consumption exceeds this amount because of the increase in recent years of Cuba's population. The per capita consumption has not only been reduced by a decrease in supplies, but also by the gain in the total number of consumers. When stocks were lowest in February, stores were unable to keep rice on hand for sale, as importations of below-average amounts were sold immediately upon receipt. Despite the increased sales of recent weeks, the demand at the present time continues to be stronger than the supply, with grocery stores still reporting inability to keep rice in stock for retail customers.

CUBA: Rice production, imports, and
apparent utilization, averages
1926-40, annual 1941-47

Year	Acreage	Yield per acre	Production a/ Rough	Production a/ Milled	Net imports	Apparent utiliza- tion
	: 1,000 : acres	: : : Bushels	: 1,000 : bushels	: Million : pounds	: Million : pounds	: Million : pounds
Average:	:	:	:	:	:	:
1926-30....	--	--	923	26	464	490
1931-35....	36	26.0	935	27	359	386
1936-40....	45	21.4	965	28	445	473
Annual:	:	:	:	:	:	:
1941.....	40	27.2	1,069	32	398	430
1942.....	73	19.8	1,444	42	342 ^{b/}	384
1943.....	66	21.2	1,400	41	442	483
1944.....	84	26.5	2,222	65	456	521
1945.....	80	22.2	1,778	52	384	436
1946.....	75	23.1	1,733	51	330	381
1947.....	72	28.2	2,029	59	--	--

Compiled from official sources and estimates of the Office of Foreign Agricultural Relations.

a/ Unofficial estimates for crops harvested October-November in years which precede given years of trade and utilization. b/ It is estimated that, in addition, 70 million pounds were withdrawn from stocks.

Existing Cuban import subsidies on United States rice will expire June 30, although subsidies are granted in the contracts for 60 million pounds of Commodity Credit Corporation rice being imported from the United States Government up to and including August. Most of this rice was expected to be imported in June. The subsidies equal \$2.14 per 100 pounds, \$1.52 of which was approved October 19, 1946, and an additional subsidy of 64 cents permitted by a decree of December 31, 1946. These were granted so that dealers might procure and sell rice at existing Cuban retail ceilings. Local agitation for the removal of price and distribution controls may soon result in a pronouncement of the Cuban Government as regards its future rice distribution and supply policy.

The United States has been the principal source of rice for Cuba only since 1940. During the early 1930's this cereal was imported primarily from the Orient. Peak imports from the Far East in 1936 approximated 430 million pounds, the countries of import being Siam, Burma, and French Indochina. In 1937, the first year in which a marked rise occurred in arrivals from the United States, imports from Asia began to decline. By 1939, about 50 percent of the total was received each from the United States and Far Eastern sources. During the 2 years before the war in Asia, the percentage imported from the United States continued to gain, amounting to 60 percent in 1940 and to 92 percent in 1941.

Retail prices (black market) are reported to have dropped to some extent below those of several weeks ago, when rice sold from 25 to 30 cents a pound. A law on April 24, 1947, established penalties for the violation of official prices. Retail ceiling prices at Habana have remained the same since June 1942, when they were established at 10 cents per libra (1.014 pounds) for short-grain rice and 13.5 cents for long-grain. Increased prices paid for rice imports have made it difficult to maintain ceiling prices.

The 1947 area planted to rice in Cuba is expected to be above average, providing weather conditions are favorable. In parts of two Provinces, heavy rains so far have retarded seeding. Other areas, however, which are not planted until later, are not yet affected. A near-record crop in 1946 was larger than expected, when good weather in the latter part of the growing season improved the yield harvested from the smallest acreage in several years. Rice from the domestic crop equaled 13 percent of Cuba's total utilization during the calendar year of 1946, the highest on record.





FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
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SOUTH AMERICAN RICE SUPPLIES NEAR LAST YEAR'S RECORD

Rice exports from South America in 1947 may approach the record attained in the preceding year, as large crops again are being produced in nearly all exporting countries. Export supplies available from the 1947 rice harvest are estimated from 500 to 700 million pounds. If the latter quantity is reached, exports will be as large as the record of last year from the countries of that Continent.

Whether that volume is shipped depends in a large measure on the amount of rice consumed in Brazil in place of wheat, which is in very short supply. Brazil's rice crop was reported about the same as the record of 1946. The surplus in Ecuador approximates last year's peak exports, and British Guiana may ship more than in 1946. Exports from Chile are prohibited because of a small crop this year. Relatively small surpluses are reported in Surinam, Uruguay, Argentina, and possibly Paraguay.

SOUTH AMERICA: Exports of milled rice a/, average 1936-40, annual 1942-46

Country of destination	Average 1936-40	1942	1943	1944	1945	1946
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Argentina.....	467	346	172	200	6,005 <u>b/</u>	10,000
Brazil.....	83,335	182,046	186,398	330,242	190,782	393,000
British Guiana....	34,296	50,354	38,483	55,088	56,934	50,671
Chile.....	3	18,635	50,723	61,234	93,030	78,497
Colombia.....	3	1,676	232	128	321 <u>c/</u>	13,000
Ecuador.....	25,685	85,205	105,923	142,427	64,635	147,928
Paraguay.....	0	278	2,027	4	—	—
Peru.....	51	<u>d/</u> 8,585	—	—	—	—
Surinam..... <u>e/</u>	12,465	1	—	—	— <u>c/</u>	2,500
Uruguay.....	3,775	2,659	1,693	—	—	1,690
Total.....	160,080	349,785	385,651	589,323	411,707	697,300

Compiled from official trade statistics, except as noted.

a/ Includes milled rice and rough rice in terms of milled. b/ Preliminary.

c/ Unofficial estimate. d/ Net imports equalled 6 million pounds. e/ Less than 5-year average.

A conservative estimate of Brazil's exportable surplus from the 1947 harvest is between 250 and 350 million pounds. This estimate takes into consideration the fact that Brazilian wheat supplies perhaps will be more deficient than last year, when the wheat shortage caused a sharp increase in rice consumption (see Foreign Crops and Markets, May 19, 1947, p. 345). Prices received for export rice,

however, may also determine the volume that will be exported during 1947. Brazil's 1946 exports were in the neighborhood of 400 million pounds, 21 percent more than the previous record, according to preliminary figures.

Two factors likely to affect the export price of rice in Brazil, as well as in other exporting countries of the Western Hemisphere are: (1) Brazil no longer has an agreement with the United Kingdom to export rice at fixed prices as it has during the past 3 years, and (2) that country dropped its membership in June from the International Emergency Food Council, and therefore has no obligation to grant export permits according to the rice allocations of the I.E.F.C.

SOUTH AMERICA: Production of rough rice,
average 1935-36 to 1939-40, annual 1941-42 to 1946-47

Country	:Average:						
	:1935-36:						
	: to :1941-42:1942-43:1943-44:1944-45:1945-46:1946-47						
	:1939-40:						
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	:bushels:	bushels:	bushels:	bushels:	bushels:	bushels:	bushels
Argentina.....	3,112:	5,296:	4,852:	8,559:	6,807:	7,736:	7,863
Bolivia.....	581:	--:	498:	--:	--:	--:	--
Brazil.....	66,424:	92,163:	93,475:	103,394:	105,182:	135,799:	--
British Guiana:	3,559:	4,236:	4,068:	4,362:	4,812:	5,028:	5,349
Chile.....	1,299:	3,008:	5,701:	7,340:	7,862:	5,778:	4,274
Colombia.....	3,378:	5,430:	5,830:	5,901:	7,940:	7,260:	7,500
Ecuador.....	3,439:	5,718:	7,607:	6,075:	4,577:	7,691:	--
French Guiana..	2:	4:	5:	5:	6:	5:	5
Paraguay.....	196:	380:	610:	740:	450:	600:	750
Peru.....	4,578:	4,897:	5,706:	7,832:	6,406:	8,290:	6,370
Surinam.....	1,703:	2,629:	1,879:	1,577:	1,685:	1,724:	2,547
Uruguay.....	866:	960:	759:	849:	1,030:	1,498:	1,811
Venezuela.....	275:	301:	754:	--:	--:	--:	--
Total b/	89,410:	125,660:	131,740:	148,110:	148,160:	183,110:	181,000

Compiled from official statistics and estimates of the Office of Foreign Agricultural Relations.

a/ Preliminary. b/ Totals are estimated if data are incomplete.

Note: One bushel of rough rice is equivalent to 29.25 pounds milled.

Export supplies from Ecuador may exceed those of 1946, when all-time high exports equalled 148 million pounds. Another record harvest is forecast from the May-August crop, which represents about 80 percent of the total production. Resumption of exports was permitted beginning June 1, in a decree which stipulated that for every 100 pounds exported, 50 pounds must be delivered to the Government for domestic utilization.

Exports from British Guiana may top last year's shipments of 51 million pounds. A record production was obtained from the 1946 harvest, from which 1947 exports are designated primarily to the Caribbean Islands. As the result of increased mechanization and expanded acreage, rice growing is expected to increase in that country.

Exports are prohibited in Chile this year, because of a very small crop. Decreased acreage and lack of water resulted in the smallest production in 5 years. In some seasons during the war that country was the third largest exporter of rice in South America, and in 1945 record shipments abroad were 93 million pounds.

Surinam has rice for export for the first time since 1941. Early in the season, a surplus of 30 million pounds of rough rice (equal to 20 million pounds milled) was declared available to the highest bidders, to whom export licenses were to be granted. Exports formerly equalled around 15 million pounds annually, but during the war production was decreased by lack of labor, and all rice was consumed domestically. Gradual completion of irrigation projects, now beginning to effect an increase in production, may bring about eventually a somewhat larger rice crop in that country.

In 1947, Uruguay's harvest was 21 percent more than the previous record production of 1946. Last year, shortages of other foods caused an increase in rice consumption and prevented exportation from the large harvest. Some surplus was expected early in the 1947 season to be available for export. In an attempt to control the rising cost of living, however, recent legislation was passed in which the Uruguayan Government is permitted to purchase all existing supplies, including new-crop rice.

SOUTH AMERICA: Rice production, trade, and apparent utilization, averages 1926-1940, annual 1941-1947

Year	Production a/	Imports	Exports	Apparent domestic utilization	Net deficit or surplus	Percent crop is of utilization
	Rough	Milled				
	: 1,000 bushels	: Million pounds	: Million pounds	: Million pounds	: Million pounds	: Percent
Average:						
1926-30:	55,181	1,533	398	80	1,851	- 318 83
1931-35:	74,970	2,193	202	186	2,209	- 16 99
1936-40:	89,410	2,615	205	160	2,660	- 45 98
Annual:						
1941...	109,720	3,209	91	114	3,186	+ 23 101
1942...	125,660	3,676	66	350	3,392	+ 284 108
1943...	131,740	3,853	25	386	3,492	+ 361 110
1944...	148,110	4,332	103	589	3,846	+ 486 113
1945...	148,160	4,334	69	412	3,991	+ 343 109
1946 c/:	183,110	5,356	50	697	4,709	+ 647 114
1947 c/:	181,000	5,300	--	--	--	--

Compiled from official sources and estimates of the Office of Foreign Agricultural Relations.

a/ The crop is harvested principally in the first part of the calendar year, except for a few countries whose harvests begin in the latter part of the preceding year and end in the first part of the given calendar year.

b/ Equivalent to 65 percent of rough rice. c/ Preliminary.

Argentina's outturn is only slightly larger than the harvest of the preceding year. Data are not available for total 1946 trade, but exports from January through October amounted to 8 million pounds.

Production in Paraguay, although small in comparison with that of other South American countries, is nearly four times as large as the pre-war harvests. Per capita consumption is small in that country, and the record output may make available a small surplus this year, since in one year exports of around 2 million pounds were shipped.

Fifteen years ago South America was a net importer of rice. Such countries as Argentina, Colombia, Peru, and Venezuela took substantial quantities to meet their requirements. Production in many countries gradually increased, however, and by 1941 the domestic output of that Continent was sufficient for consumption, with a small surplus for export. Rice consumption has continued to rise since 1930, and exports steadily increased after 1941.

As a result of the increased production in South American countries, several nations which formerly took relatively heavy imports now export rice. However, there are a few countries such as Bolivia and Venezuela that continue to need rice from other sources. Other countries also require imports in years of poor crops.

Needs in the importing countries may be larger than in 1946 because of small crops in some areas. The production in Peru is down one-third below the crop last year, which means a decrease in supplies of around 55 million pounds from the domestic crop. Despite a record outturn last year, 1946 imports into Peru equalled 6 million pounds.

Regardless of production having increased in Venezuela during recent years, at least 25 million pounds was imported during 1946. Exports from Ecuador to that country were reported at 17 million pounds, and from Chile, 8 million. Estimates of production for Venezuela vary, but the crop is reported to be larger than prewar.

Bolivia continues to import rice, even though the domestic crop is reported to be substantially larger than before the war. Nearly all of the imports of 24 million pounds in 1946 originated from Chile.

Currently a rice shortage exists in Colombia, and that country is seeking to import some rice. Although rice is harvested in some part of Colombia at all seasons of the year, the main harvest is about October. Supplies from the 1946 main harvest are estimated to be less than in the preceding year, when nearly 15 million pounds was exported to Cuba.





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ASIA'S RICE SUPPLIES STILL BELOW PREWAR ✓

The current rice supplies of Asia remain substantially below prewar, after two years of rehabilitation, and prospects for rice production next season do not favor improvement in availabilities during coming months. Early season prospects for the 1947-48 output indicate the crop may not greatly exceed and may even be smaller than last year's harvest, or around 90 percent of prewar output.

Rice acreages are being increased in China, Japan, Korea, the Philippine Islands, Burma, and the Malayan Union. This recovery may be offset, however, by a reduction in the area planted to rice in India. In some of the countries where acreages show a gain, the weather may not be so favorable as in 1946-47.

Not only are supplies from domestic production reduced substantially in importing countries, but rice available for import is less in countries that had surpluses before the war. Total exports of Asiatic countries dropped from an average (1935-39) of 16,000 million pounds yearly to 2,100 million in 1946, the first postwar year for which figures are available. Exports during the preceding year, the last year of the war, were virtually at a standstill. All the exports from Asiatic countries during 1946 went to the deficit countries of Asia. Consideration should be given also to the movement of rice that was smuggled in some instances during 1946 from localities of Asia's exporting countries to populations in the nations having shortages.

Prewar countries of export

During the war, lack of export markets caused a pronounced decline in the rice production of the three major-exporting countries of Asia. The harvests of Burma, Siam, and French Indochina fell to 38, 56, and 70 percent of former output, respectively. For this reason, total exports from this region during 1946 were only 17 percent of prewar. Burma's exports were 14 percent, Siam's 33 percent, and those of French Indochina, only 7 percent of former exports.

Burma is the only one of these countries where a steady gain is reported in the area planted. That country's acreage last season increased 11 percent over the very small area of the preceding year, which was planted in the last months of the war. A continued increase is anticipated in 1947-48 plantings, now nearly completed. The goal set for planted acreage is 9,000,000 acres, compared with the first estimate of 8,078,000 acres sown a year earlier and a harvested area of 7,734,000 acres. If this goal is realized, the rice area will reach 75 percent of the prewar average. Weather up to August 15 was favorable for transplanting.

Deficient rainfall in Siam during the planting season is preventing full sowing of intended acreages. In several areas, seedlings are reported to be spoiled in nurseries and difficulty is encountered in obtaining new seed for replanting this season. Production in 1947-48, therefore, may not show very much improvement over the small results of the preceding season, when adverse weather also retarded

planting, caused low yields harvested per acre, and prevented a gain over the low wartime production of 1945-46.

The rice production of French Indochina may not increase because of continued unsettled political conditions. Production, rather than being restored to the prewar level, appears to be gradually declining. Part of last season's harvest was destroyed by riots in several districts, and former acreages may not be replanted until peaceful conditions prevail in the country.

Korea and Formosa formerly accounted for about one-fourth of Asia's total rice exports by shipments to Japan. The production of 1947 in these countries again will be below prewar. If weather continues favorable, Korea's crop may equal or slightly exceed that of last year, which was about 80 percent of the prewar average. Acreage is reported up about 1 percent. All the harvest is needed for domestic use, however, as the heaviest production is in South Korea, which represents about 65 percent of that in former Korea. Migration to South Korea since the war ended has caused a substantial increase in population, which means a greater demand for rice in that section. Before the war, rice was sent to Japan from Korea, and other grains imported for consumption, but since the war these grains have not been imported. Formosa's 1947 crops are reported very good, and any surplus that is produced may be available for China Proper.

ASIA: Rice (rough), acreage and yield per acre, average 1935-36 to 1939-40, annual 1945-46 and 1946-47 a/

Country	Acreage			Yield per acre		
	Average			Average		
	1935-39	1945-46 ^{b/}	1946-47 ^{b/}	1935-39	1945-46 ^{b/}	1946-47 ^{b/}
	to			to		
	1939-40			1939-40		
	1,000	1,000	1,000			
	acres	acres	acres	Bushels	Bushels	Bushels
Burma	12,671	6,983	7,734	27.5	19.3	25.0
French Indochina ^{c/}	14,020	9,800	9,600	^{c/} 22.5	22.4	20.8
Siam	7,088	4,890	5,000	30.1	24.5	24.0
Korea	3,838	^{d/}	^{d/}	51.0	^{d/}	^{d/}
Ceylon	870	800	1,000	17.2	10.0	16.0
China:						
China Proper	^{c/} 48,161	46,000	45,927	^{c/} 52.5	45.7	50.5
Formosa	1,616	1,270	1,297	53.0	32.0	42.5
Manchuria	782	940	400	40.6	41.6	37.5
India ^{e/}	72,707	79,885	^{d/}	26.2	24.6	^{d/}
Japan	7,862	^{f/} 7,089	^{f/} 6,953	75.8	64.5	^{f/} 80.7
Malayan Union	746	790	810	36.3	23.6	28.1
Netherlands Indies ^{g/} ^{c/}	9,716	7,770	8,640	^{c/} 31.6	25.7	28.9
Philippine Islands ..	4,918	4,346	4,900	22.2	20.1	20.5
Other countries	11,465	12,417	12,939	--	-	-
Estimated total ...	196,460	187,000	190,000	-	-	-

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, and other information.

a/ Harvested acreage of year beginning August 1. b/ Preliminary. c/ Less than 5-year average. d/ Unavailable. e/ Acreage of regularly reported areas only, or 92 percent of the total. f/ As reported. Actual acreage believed to be larger and the yield per acre less. g/ Java and Madura only.

Importing countries

Asia's heaviest rice producer, China, has the largest deficit compared with prewar utilization. The 1946 crop was around 300 million bushels (9,500 million pounds milled) below average (1935-39), and imports also are less than before the war. The 1947 acreage planted to rice is 1 percent larger than last year's sown area, but about 4 percent below the prewar average.

Crop conditions early in August were fairly good, with the exception of floods in some districts in the southwest Provinces. Kwangtung, the largest-producing Province, was hardest hit. As a result, the yield per acre of all China may equal that of last year, when weather conditions were favorable and yields were nearly up to the prewar average.

Increased acreage and production in those Provinces occupied by Japan during war in east China, as the result of improved irrigation and varieties alleviates to some extent the decreased output in central Yangtze Valley area. This region formerly constituted the main rice fields of China, but acreages in these Provinces are still substantially below the prewar average. The main harvest of China begins in July and continues principally through August and September.

ASIA: Rice (rough) production, average 1935-36 to 1939-40,
annual 1945-46 and 1946-47 a/

Country	Production						
	Average				1946-47		
	1935-36	1945-46 ^{b/}	1946-47 ^{b/}	Percent	Less	Increase	
	to			of	than	over	
	1939-40			prewar	prewar	1945-46	
	Million	Million	Million		Million	Million	
	bushels	bushels	bushels	Percent	bushels	bushels	
Burma	349	134	193	55	-156	+59	
French Indochina ^{c/}	316	220	200	63	-116	-20	
Siam	213	120	120	56	-93	0	
Korea	196	175	160	82	-33	-15	
Ceylon	15	8	16	107	0	+8	
China:.....							
China Proper	2,623	2,160	2,321	88	-300	+160	
Formosa	86	41	55	64	-11	+14	
Manchuria	32	39	15	47	-17	-14	
India ^{d/}	1,905	1,962	^{e/}	^{e/}	^{e/}	^{e/}	
Japan	596	457	561	94	-39	+101	
Malayan Union	27	19	23	85	-4	+4	
Netherlands Indies ^{f/} ^{c/}	307	200	250	82	-56	+50	
Philippine Islands ..	109	87	100	92	-9	+13	
Other countries	340	275	325	96	+15	-10	
Estimated total ...	7,115	5,900	6,400	90	-700	+500	

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, and other information.

a/ Year beginning August 1. b/ Preliminary. c/ Less than 5-year average.

d/ Production in regularly reported areas only, or 92 percent of the total.

e/ Unavailable. f/ Java and Madura only.

ASTA: Imports (gross) of rice, in terms of milled, by principal country of origin, average 1935-39, annual 1946

Country of origin

Importing country	1935-39										1946a/			
	Burma	Siam	French Indo-china	Korea and Formosa	Others	Total	Burma, Siam, and French Indo-china	United States	Others	Total	Million pounds	Million pounds	Million pounds	Million pounds
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
British India b/...	3,241	40	219	0	1	3,501	580	0	35	615				
Ceylon	794	203	21	0	200	1,218	60	0	510	570				
China:														
China Proper	121	383	482	0	87	1,073	355	80	0	435				
Manchuria c/.....	36	14	56	0	85	191	0	0	0	0				
Japan	2	2	75	d/4,173	7	4,259	0	0	0	0				
Malayan Union	514	1,057	73	0	23	1,667	510	0	45	555				
Netherlands Indies:	251	250	80	0	41	622	185	25	0	210				
Philippine Islands:	4	36	76	0	1	117	110	185	20	315				
Other countries ..	230	220	120	0	80	650	240	0	10	350				
Estimated total	5,200	2,200	1,200	4,200	500	13,300	2,140	290	620	3,000				

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign-service officers, results of office research and other information.

a/ Preliminary.

b/ Average 1927-38 to 1938-40 (April-March).

c/ Average 1935-37.

d/ Average of 2,644 million pounds from Korea, and 1,529 million from Formosa, 1934-35 to 1938-39 (November-October marketing year).

A sharp drop in Manchurian rice production after the war is attributed primarily to repatriation of Japanese and Korean nationals. For this reason, the demand in this area should also be smaller. Production in 1946 was not quite one-half of the prewar average. The planting of the 1947 crop in central Manchuria had a slow start because of dry weather, but prospects in the southern part were good in the early stages.

In Japan, production before the war equaled nearly 85 percent of that country's rice consumption. The remainder consisted of more than 4,000 million pounds of brown rice imported from Korea and Formosa. Production in 1946 was 94 percent of the prewar outturn, and insignificant quantities have been and continue to be available for import since the end of the war.

The goal of that country's acreage of 1947 is larger than that of last year, but it is not yet up to the prewar normal. Given favorable weather, the output may approach the bumper crop of the preceding season, when very good growing conditions resulted in above-average yields per acre.

Although imports were received from the colonies as early as 1910, they were increased after 1930. During the 10 years prior to 1930, Japan also took from 500 to 1,500 million pounds from foreign countries. From 1926 to 1930, the volume averaged nearly 700 million pounds annually in terms of milled rice, as follows (million pounds): Siam, 330; French Indochina, 177; British India (Burma), 120; the United States, 54, and others, 19.

The Government of India, before the division of the country, stated that import needs were at least equal to prewar, when between 2,000 and 3,000 million pounds were imported annually. Although the 1947-48 combined rice acreage of India and Pakistan may be reduced below that of a year earlier, it should be larger than prewar, since it increased about 15 percent during the war, according to official Indian statistics.

The total area planted to rice this season in these countries depends on the extent to which early intentions to increase jute acreage are carried out. At the outset of the season, it was believed about 1 million acres of jute would be planted in Bengal on land devoted to rice last year. In other parts, the acreage may be about the same as the near-record of a year earlier. Weather during the main planting season up to July 15 was drier than usual.

Two countries of Asia which depended upon a substantial quantity of imports before the war were the Malayan Union and Ceylon. Since the war, these countries have been unable to obtain one-half the prewar imports, and the per capita availabilities have seriously decreased.

Production in the Malayan Union before the war supplied about 40 and imports about 60 percent of that country's rice requirements. Net imports in 1946 were 47 percent of the prewar average. Lack of rice imports since the war has caused that country to increase acreage. Plantings in 1947-48 are expected to be at least 10 percent more than that of the preceding year.

A gain in upland rice acreage in 1946-47 brought the total plantings to a larger area than before the war. The harvest, however, was only 85 percent of former output, because (1) yields on unirrigated areas are smaller than in irrigated fields, and (2) improved facilities that enabled fair yields before the war have deteriorated.

ASIA: Rice (milled), production, net trade, and apparent utilization,
average 1936-40, annual 1946

Country	Production			International trade			Apparent utilization		
	1935-36	1945-46	Percent	1936-40a/	Net	Percent	1936-40	1946 b/	Percent
	to	1945-46	of	1946b/	Net	of	a/	of	newwar
	1939-40	prewar	prewar	imports	exports	prewar			
	Million:	Million:	Million:	Million:	Million:	Million:	Million:	Million:	Million:
	pounds	pounds	Percent	pounds	pounds	Percent	pounds	pounds	Percent
Burma	10,994	4,221	38	6,504	-	14	4,490	3,284	73
French Indochina	9,954	6,930	70	2,968	-	7	6,986	6,713	96
Siam	6,710	3,780	56	3,032	-	33	3,672	2,791	76
Korea	6,174	5,512	89	2,252	-	0	3,922	5,512	141
Ceylon	472	252	53	-	1,208	47	1,680	822	49
China:									
China Proper	22,624	68,040	82	-	822	53	83,446	68,475	82
Formosa	2,703	1,292	48	1,242	-	0	1,467	1,292	88
Manchuria	1,008	1,228	122	-	170	0	1,178	1,228	104
India d/	65,000	67,000	103	-	2,500	25	67,500	67,615	100
Japan	18,774	14,396	77	-	3,414	0	22,188	14,396	65
Malayan Union	850	599	70	-	1,184	47	2,034	1,154	57
Neth. Indies e/	13,920	10,080	72	-	422	50	14,342	10,290	72
Philippine Islands	3,474	2,740	80	-	130	242	3,564	3,055	86
Other countries	1,480	1,670	110	100	1,650	-	3,030	1,930	64
Estimated total	224,100	187,700	84	16,100	11,500	-	219,500	188,600	86

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research and other information.

a/ 1936-40 average, if available. Otherwise, a representative average is used.

b/ preliminary.

c/ Less than 5-year average.

d/ Estimate for all India.

e/ Estimate for all Netherlands Indies.

Ceylon's rice consumption before the war consisted about 70 percent of imports, and nearly 30 percent of native production. That country likewise experienced difficulty in obtaining rice imports during and following the war. In 1946, total imports received from Burma, Egypt, and Brazil equaled 47 percent of the prewar average imports. The rice consumption of that country, therefore, is at about one-half its prewar level. Attempts to increase production on the Island since the war started have not met with great success. The acreage of 1947 may be about the same as that of the preceding year, when the harvest showed a moderate gain above the prewar average.

The prewar production of the Philippine Islands was approximately sufficient for utilization in years of good crops, but on the average, annual output met about 95 percent of requirements. Rice planting this season is expected to be greater than in any year since liberation. An early estimate of the acreage is about equal to prewar, and the pre-harvest forecast of the crop is favorable. If weather continues good, the crop should approach the prewar outturn. The harvest, however, is not expected to be sufficient for domestic needs.

The domestic production of the Netherlands Indies in 1941 had increased to a point slightly exceeding self-sufficiency. During the war, however, the output decreased, and the April-June 1947 harvest was reported between 80 and 85 percent of the prewar average, according to official statistics. Current political factors make impossible an appraisal of that country's present rice supplies in relation to requirements.





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WORLD RICE PRODUCTION AGAIN BELOW PREWAR

Early season prospects indicate the world rice crop of 1947-48 (August-July) will be about the same as in the preceding year and about 7 percent below prewar production. The harvest is placed at about 6,950 million bushels, compared with 6,900 million in 1946-47 and 7,400 million in the prewar period (1935-36/39-40), in a preliminary estimate by the Office of Foreign Agricultural Relations.

Despite only a slight gain in total world production over that of the preceding year, the output will be larger in most countries, particularly in Asia and in Europe where output was greatly decreased during the war. Production is below that of a year earlier in India and Pakistan, where the combined acreage is reported to have been reduced below last year. Excluding the output in that region, the harvest of the other countries of the world may be nearly 200 million bushels larger than in 1946-47. Production is larger in most other Asiatic countries, and in Europe, North America and Africa. For the South American countries it is too early to do more than approximate the 1947-48 rice acreage and assume average yields per acre.

The acreage of Asia's rice crops being harvested and yet to be harvested is increased in China, Japan, Burma, Siam, Korea and the Philippine Islands. That of British Malaya is also expected to be larger. Weather in most of these countries has been quite favorable for production.

In the prewar surplus countries of Burma, Siam, and French Indochina, total production may be nearly 100 million bushels more than in the year before. The largest gain is in Burma, where the acreage goal was 9,000,000 acres, compared with the harvested acreage of 7,734,000 acres in 1946-47. Early in the season the goal was reported as easily attainable but some acreage was destroyed by heavy floods in August.

Maximum recovery in Siam's rice production was prevented by drought during transplanting. Despite this setback, acreage is believed to be larger, and production more, than in the preceding year. Because of unsettled political conditions, a further decline is expected in the output of French Indochina.

Production in China is estimated at 2,360 million bushels, a slight gain over the final estimate of 2,320 million the preceding year. The acreage was larger than in 1946, and, with the exception of damage by floods in some districts, good yields per acre are being harvested. Although this year's crop is slightly larger than in 1946, production is about 250 million bushels less than during 1935-39, a period of exceptionally good harvests.

ROUGH RICE: World acreage, yield per acre, and production, averages 1930-31 to 1939-40, annual 1945-46 to 1947-48 a/

Continent and country	Acreage			Yield per acre			Production		
	Average			Average			Average		
	1930-31 to 1939-40	1945-46	1946-47	1935-36 to 1939-40	1945-46	1946-47	1935-36 to 1939-40	1945-46	1946-47
	acres	acres	acres	bushels	acres	bushels	bushels	bushels	bushels
North America:									
El Salvador.....	22	25	-	27.7	-	-	693	799	-
Mexico.....	84	95	170	42.2	173	41.2	4,007	6,125	7,200
Republic of Panama.....	35	50	105	32.0	-	27.3	960	2,585	-
United States.....	883	1,004	1,567	49.7	1,623	45.6	41,572	68,150	76,047
Caribbean:									
Cuba.....	36	45	72	21.4	70	28.2	935	1,733	2,029
Dominican Republic.....	45	80	136	36.3	-	25.5	1,517	4,328	-
Trinidad.....	7	10	22	30.0	-	38.4	180	711	844
Total.....	1,190	1,410	2,300	-	2,370	-	51,100	88,900	92,700
Europe:									
Bulgaria.....	18	19	14	54.8	-	35.7	791	698	500
Italy.....	360	362	301	103.9	330	86.4	34,139	20,000	26,000
Portugal.....	39	50	64	68.0	65	54.7	1,740	2,179	3,500
Spain.....	117	110	125	124.4	125	76.4	14,558	10,600	9,550
Total (excluding U.S.S.R.).....	540	560	550	-	580	-	51,500	34,200	40,500
U.S.S.R. (Europe and Asia).....	328	384	335	42.3	-	-	10,785	-	-
Asia:									
Iran.....	560	534	-	d/37.1	-	-	d/22,413	20,802	22,159
Iraq.....	316	386	-	d/27.3	-	-	d/7,750	12,200	13,720
Turkey.....	66	78	36	61.2	-	57.5	3,329	2,387	2,070
British Malaya.....	740	746	797	36.3	890	25.0	25,333	18,650	19,896
Burma.....	12,770	12,671	7,734	27.5	8,400	25.0	358,219	134,455	193,412
China.....	d/47,099	d/48,161	45,927	d/52.5	46,000	50.5	2345,574	2159,964	2320,909
Formosa.....	1,609	1,616	1,297	53.0	1,450	42.5	75,340	40,671	55,109
Manchuria.....	472	782	400	40.6	400	37.5	14,923	39,094	15,000
French India.....	47	47	-	25.0	-	-	1,281	1,132	-
French Indochina.....	13,505	d/14,020	9,600	d/22.5	8,900	20.8	281,497	220,000	200,000
India f/.....	70,288	72,707	81,000	26.2	-	25.8	d/995,645	1961,877	2090,000
Japan.....	7,887	7,862	7,700	75.8	7,830	72.4	557,217	457,007	557,548
Korea.....	4,112	3,838	2,711	51.0	2,744	40.6	197,500	195,763	211,321
Netherlands Indies h/.....	9,140	d/9,716	8,640	d/31.6	1/	28.9	276,935	200,000	250,000
Philippine Islands.....	4,643	4,918	4,900	22.2	4,900	20.5	103,939	87,466	100,300
Siam.....	7,141	7,088	4,600	30.1	5,000	26.1	231,402	120,000	150,000
Total (excluding U.S.S.R.).....	190,720	196,500	189,400	-	189,800	-	6802,300	5963,200	6425,600
Total (including U.S.S.R.).....	1,518	1,994	2,835	-	2,958	-	111,885	143,100	164,200

<u>South America:</u>													
Argentina.....	25	52	122	117	1/	59.8	69.4	1,054	3,112	7,736	8,123	1/	
Brazil.....	2,074	2,323	4,154	4,120	1/	28.6	30.3	58,970	66,424	135,799	125,000	1/	
British Guiana.....	78	70	95	101	1/	50.8	53.0	3,445	3,559	5,028	5,349	1/	
Chile.....	b/	13	119	80	1/	99.9	54.6	18	1,299	5,778	4,364	1/	
Colombia.....	d/	-	-	-	1/	-	-	d/2,508	3,378	6,030	5,900	1/	
Ecuador.....	-	-	-	-	1/	-	-	2,212	3,439	7,691	7,100	1/	
Paraguay.....	4	d/	10	15	1/	46.0	50.3	d/ 175	d/ 460	603	754	1/	
Peru.....	126	107	148	124	1/	42.8	45.6	4,551	4,578	8,291	5,653	1/	
Surinam.....	29	37	35	40	1/	46.0	63.7	1,978	1,703	1,724	2,547	1/	
Uruguay.....	d/	13	21	25	1/	66.0	72.4	201	866	1,423	1,311	1/	
Total.....	2,570	2,940	5,290	5,200	5,180	-	-	74,800	82,500	181,800	163,500	160,000	
<u>Africa:</u>													
Belgian Congo.....	-	d/	220	-	-	d/ 11.2	-	-	d/ 2,475	4,605	-	-	
Egypt.....	352	463	654	656	700	71.6	70.1	20,876	32,155	42,453	45,971	46,040	
French West Africa.....	1,065	d/ 1,562	2,459	-	-	d/ 13.4	-	18,087	d/20,936	29,051	-	-	
Madagascar.....	1,354	1,195	1,430	1,430	1,480	28.3	24.0	34,166	33,823	37,722	34,293	36,350	
Sierra Leone.....	307	340	-	-	-	26.8	-	9,015	9,100	9,308	-	-	
Total.....	3,560	4,190	6,090	6,160	6,260	-	-	88,900	106,000	134,600	136,700	139,000	
<u>Oceania:</u>													
Australia.....	21	23	28	32	30	92.0	86.0	1,629	2,117	2,553	2,753	2,753	
Fiji Islands.....	10	10	24	-	-	-	-	480	431	1,060	-	-	
Total.....	40	40	80	90	90	-	-	2,200	2,700	4,700	4,900	4,900	
Total World.....	198,900	206,000	200,500	204,400	204,700	-	-	7082,000	7446,000	6418,000	6876,000	-	

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign-service officers, results of office research, and other information.

a/ Crops harvested in Northern Hemisphere countries during the latter part of the year, together with those harvested in Asia principally from November to May, are combined with crops harvested in Southern Hemisphere countries during the first part of the following year.

b/ Preliminary.

c/ Average 1930-31 to 1934-35.

d/ Less than 5-year average.

e/ Planted acreage.

f/ Includes acreage and production in areas regularly reported only comprising about 92 percent of the total rice area of India.

g/ South Korea only.

h/ Java and Madura only.

i/ Acreage not yet planted.

In India and Pakistan, little information is available in regard to the rice crop to be harvested principally in December. The 1947-48 production is reported to be less than in the preceding year. It is known that in Bengal, more than 1,000,000 acres of last year's rice area was planted to jute.*

The acreage in Japan was larger than in 1946, and fairly good conditions prevailed during the early part of the season. Production equal to the very good crop of the year before had been forecast, but damage caused by recent floods resulted in a slight downward revision in the crop estimate. The acreage of South Korea also was increased, and conditions have been favorable for production. The crop being harvested is substantially larger than last year's.

In the Malayan Union, about 100,000 additional acres are planned for rice production during the 1947-48 season. Despite a gain in acreage of nearly 20 percent over the prewar area, production is not expected to approach the former level. This is because most of the new acreage will be in unirrigated areas, where the yield per acre is less than in irrigated sections. Floods in Ceylon caused a moderate reduction in the rice crop of that country.

The rice acreage in the Philippine Islands is the largest of any since liberation. An early estimate of the acreage places it at about equal to prewar, and a pre-harvest forecast of the crop was favorable.

The production of North America is estimated at 99,000,000 bushels compared with 93,000,000 in the preceding year, and with 63,000,000 during the prewar average. The United States is harvesting another record crop from the largest acreage yet planted. The area sown to rice is 600,000 acres more than the prewar (1935-39) average, and 25,000,000 bushels more are being harvested, according to the September 1 crop report.

The rice acreage of Mexico also increased over the previous record of last year, and a bumper crop is forecast in that country. Cuba's acreage was reduced slightly owing to rainy weather which prevented planting of the intended acreage. Good weather has helped the crop so far, however, and production is expected to be larger than that of a year ago.

Europe's harvest is forecast at 47,000,000 bushels compared with 40,000,000 the preceding year, and 53,000,000 before the war. The total acreage planted in European countries, however, is larger than before the war. Despite this, rice production may be hardly 90 percent of the prewar

*The 1946-47 rice crop of India is now estimated at 2,105 million bushels harvested from 81,810,000 acres, according to a cable just received from India. The 1947-48 production and acreage are estimated (preliminary) at 1,980 million bushels and 80,500,000 acres by the Office of Foreign Agricultural Relations. (Cable received since the preparation of this summary.)

average because of lack of fertilizers. The acreage increase is in Spain and Portugal, where the combined acreage is 30,000 acres more than the pre-war area. As the result of smaller yields per acre caused by fertilizer shortages, the production in these countries is only slightly larger than during the prewar period.

Although the Italian acreage is estimated to have increased about 10 percent over that of a year earlier, it was 30,000 acres less than the pre-war area planted to rice. Conditions have been favorable for a good crop, and a large harvest is now in progress.

In Africa, large crops are forecast for Egypt and Madagascar, the principal exporting countries. A record acreage was planted in Egypt, weather has been favorable, and a bumper crop is expected to be harvested. Acreage was also increased in Madagascar and production is believed to be slightly larger than in the preceding year.

Most of the 1947-48 rice acreage of South America is not yet planted. The area which will be sown in the exporting countries of Brazil and Ecuador may depend to some degree on the extent to which the 1947 surpluses may be exported at prices profitable to producers. Lack of agreement on prices so far has held up the exportation of surpluses from the crops harvested in these countries from June to August 1947.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C.M. Purves, Fred J. Rossiter, L. Thelma Willahan, W.I. Ladejinsky, and Lois E. Bacon.

